

**Clause(s):**

**This order is subject to the Terms and Conditions of GSA Contract Number GS-35F-0153M.**

**CUSTOM      INVOICING      RTP Finance Invoicing Information**

Invoices shall be prepared containing the following information: Purchase Order Number, description of commodities/services furnished, period of performance, taxpayer ID number and amount due.

Invoices shall be submitted to the address specified in block 18a of this order.

OR

Invoices shall be submitted via e-mail to RTPReceiving@epa.gov  
Provide the pdf file with the following naming convention and SUBJECT in email:  
SI\_PO#\_inv#.pdf Example: SI\_EP08X00005\_5335.pdf

For status of Invoice Payments, call the Financial Office's Customer Service at (919)541-0616.

**The FedEx/Commercial Courier address for invoices:**

US EPA, RTP-Finance (Mail Drop D143-02)  
4930 Page Road  
Durham, NC 27703

Vendors interested in checking the status of payments should use the Department of Treasury's Payment Advice Internet Delivery (PAID) system. It is located on the following web site and requires registration: <http://www.fms.treas.gov/paid/index.asp>

**CUSTOM      TAX**

The Federal Government is exempted from paying taxes. The tax exempt number is 52-085-2695.

**FAR    52.204-6      Data Universal Numbering System (DUNS) Number. (APR 2008)**

**FAR    52.232-1      PAYMENTS (APR 1984)**

This clause is incorporated by reference. The full text of the clause is available at:  
<https://www.acquisition.gov/FAR/>.

**FAR    52.232-8      DISCOUNTS FOR PROMPT PAYMENT (FEB 2002)**

This clause is incorporated by reference. The full text of the clause is available at:  
<https://www.acquisition.gov/FAR/>.

**FAR    52.232-33      PAYMENT BY ELECTRONIC FUNDS TRANSFER – CENTRAL  
CONTRACTOR REGISTRATION (OCT 2003)**

This clause is incorporated by reference. The full text of the clause is available at:  
<https://www.acquisition.gov/FAR/>.

**EPAAR 1552.237-71 Technical direction**

(a) Definitions.

Contracting officer representative (COR), means an individual appointed by the contracting officer in accordance with Agency procedures to perform specific technical and administrative functions.

Task order, as used in this clause, means work assignment, delivery order, or any other document issued by the contracting officer to order work under a service contract.

(b) The contracting officer representative(s) may provide technical direction on contract or work request performance. Technical direction includes:

(1) Instruction to the contractor that approves approaches, solutions, designs, or refinements; fills in details; completes the general descriptions of work shifts emphasis among work areas or tasks;

and

(2) Evaluation and acceptance of reports or other deliverables.

(c) Technical direction must be within the scope of work of the contract and any task order there under. The contracting officer technical representative(s) does not have the authority to issue technical direction which:

(1) Requires additional work outside the scope of the contract or task order;

(2) Constitutes a change as defined in the "Changes" clause;

(3) Causes an increase or decrease in the estimated cost of the contract or task order;

(4) Alters the period of performance of the contract or task order; or

(5) Changes any of the other terms or conditions of the contract or task order.

(d) Technical direction will be issued in writing or confirmed in writing within five (5) days after oral issuance. The contracting officer will be copied on any technical direction issued by the contracting officer technical representative.

(e) If, in the contractor's opinion, any instruction or direction by the contracting officer representative(s) falls within any of the categories defined in paragraph (c) of the clause, the contractor shall not proceed but shall notify the contracting officer in writing within 3 days after receiving it and shall request that the contracting officer take appropriate action as described in this paragraph. Upon receiving this notification, the contracting officer shall:

(1) Advise the contractor in writing as soon as practicable, but no later than 30 days after receipt of the contractor's notification, that the technical direction is within the scope of the contract effort and does not constitute a change under the "Changes" clause of the contract;

(2) Advise the contractor within a reasonable time that the government will issue a written modification to the contract; or

(3) Advise the contractor that the technical direction is outside the scope of the contract and is thereby rescinded.

(f) A failure of the contractor and contracting officer to agree as to whether the technical direction is within the scope of the contract, or a failure to agree upon the contract action to be taken with respect thereto, shall be subject to the provisions of the clause entitled "Disputes" in this contract.

(g) Any action(s) taken by the contractor, in response to any direction given by any person acting on behalf of the government or any government official other than the contracting officer or the contracting officer representative, shall be at the contractor's risk.

(End of clause)

## **STATEMENT OF WORK**

### **Support Activities for EPA's Center for Corporate Climate Leadership: Technical and Communications Support**

#### **Background**

The Environmental Protection Agency's Energy Supply and Industry Branch (ESIB) is responsible for successful voluntary climate change programs that reduce greenhouse gas (GHG) emissions by creating and expanding markets for clean energy. The primary goal of these programs is to cost-effectively reduce GHG emissions and other regulated pollutants while providing additional benefits to ESIB partners in the form of enhanced recognition and a cleaner corporate footprint.

To help achieve this goal, EPA launched the Climate Leaders program in 2002 to assist companies in developing and implementing long-term climate change strategies. Over nearly nine years, the program worked with companies from a variety of sectors, such as manufacturing, power generation, retail and others. Under the program, tools and resources were developed to help Partners in setting corporate-wide GHG reduction goals and producing inventories of their emissions to measure progress. In September 2010, the Agency decided to phase down the Climate Leaders Program in response to the emergence of other programs available to work directly with companies and to the advent of EPA's GHG Reporting Program, which requires annual mandatory reporting of emissions from facilities with 25,000 tons of carbon dioxide equivalent and others meeting specific requirements. The program officially ended on September 30, 2011.

Building upon the successes of Climate Leaders and its legacy of resources and expertise in corporate GHG emissions management, EPA launched the Center for Corporate Climate Leadership (the Center) in February 2012 and is engaging in several activities to continue to promote cost-effective GHG reductions, high-quality GHG inventories, and climate leadership. The actions of the Center will include: the Climate Leadership Awards (jointly sponsored with 3 climate NGOs); supply chain GHG management; strategic partnerships and engagements; GHG data analysis focusing on large end-users of electricity; the promotion of GHG management best practices and technologies in collaboration with ENERGY STAR and other EPA programs; and the provision of enabling tools.

#### **Objective and Overview**

The objective of this task order is to address the technical, communication and other support needs of the Center. The task order shall garner technical, administrative, and creative support to carry out the work of the Center. The Contractor shall assist EPA in the reduction of corporate GHG emissions through the continuous improvement and success of the Center.

The Contractor shall provide support to EPA on the following tasks:

- Task (1.0) Task Order Administration
- Task (2.0) Technical Assistance to the Center
- Task (3.0) Other Technical Evaluations
- Task (4.0) Communications and Web Support to the Center

### **Period of Performance**

The period of performance for this Task Order is from the effective date through November 30, 2013.

### **Description of Tasks**

#### **Task 1.0 Task Order Administration**

The work under this task entails administrative activities necessary for carrying out the work under this task order, including monthly progress reports and budget discussions with the EPA Contracting Officer's Representative (COR). The Contractor shall maintain and promote lines of communications including check-in and deliverables meetings for all tasks and subtasks. At the request of either the government or the Contractor, meetings shall be held to discuss the overall progress on the task order, or to resolve conflicts or other issues that may arise in the implementation of work under this contract. When needed, these discussions will normally be conducted via conference call. However, the government reserves the right to hold in-person meetings in Washington, D.C. The Contractor shall also perform tracking activities so it can respond to requests for information from the government concerning issues of task order management, i.e., overall progress on the contract, trouble-shooting, and other task order-level issues. As specified in written technical direction issued by the COR, the Contractor shall address specific issues or provide non-routine type data or information to aid in tracking performance under this contract. The Contractor shall prepare a monthly progress report that outlines the task order activity, including existing and planned budgets, staffing/level of effort, and other direct costs as directed by the COR. The Contractor shall email the report to the COR and the Contracting Officer.

#### **DELIVERABLES**

- EPA expects two meetings a month, or as needed, between the COR and Contractor to address general task order management, planning and coordination roles.
- EPA expects the Contractor to provide monthly budget updates and analysis, including progress reports; invoices; and cost tracking for each task, subtask and labor rate category by dollar and hours spent; percent of total budget spent and total budget remaining, or as directed by the COR. The Contractor shall deliver these reports in a spreadsheet or as directed by COR by email to EPA by the 15th of the following month.
- The Contractor shall provide and update a reporting detail (e.g. schedule, calendar) for regularly occurring communications, events and Web tasks such as regularly (weekly,

monthly or quarterly) scheduled communications tasks. A planning calendar for each event shall also be provided and updated from the initial project planning phase through event completion.

- Specific special projects or other initiatives for which EPA wants subtask level cost break out.

## **Task 2.0 Technical Assistance to the Center**

EPA will require technical assistance that relates to the Center. For example, the Contractor will assist EPA in the ongoing development and/or revision of automated reporting or calculation tools such as the Center's Simplified GHG Emissions Calculator, Corporate GHG Goal Evaluation Model and the EPA Emissions Factor Hub. The Contractor will also assist EPA in drafting or revising technical guidance documents as necessary, at the direction of the COR.

## **DELIVERABLES**

- The Contractor shall help EPA maintain the emissions factors and methodological rigor of any data, documents, tools and models prepared for the Center.
- The Contractor shall assist EPA in updating and enhancing technical guidance documents, originally developed under Climate Leaders, including in the following categories:
  - Events and conferences
  - Commuting, business travel
  - Stationary combustion
  - Electricity
  - Mobile combustion
  - Refrigerant use
  - Green power guidance
  - Design Principles
- EPA expects the updating of four technical guidance documents and maintenance of three calculation tools.
- The Contractor shall apply proper quality assurance and quality control (QA/QC) consistent with EPA guidelines to any data, documents, tools and models prepared and maintained for the Center.
- EPA expects the Contractor to help determine potential new technical or policy content for the Center. These could include new resources on topics such as management of GHGs from corporate supply chains, GHG life cycle analysis of products, cost-benefit calculations and analysis for GHG friendly technologies, etc. Furthermore, these new resources could come in the form of white papers, best practices/case studies, links to other helpful tools, etc. For planning purposes, Contractor may assume up to 2 white papers and 10 case studies.

## **Task 3.0 Other Technical Evaluations**



There are expected to be some unforeseen issues that arise during the course of the operation of the Center that will require technical analysis. As part of this task, the contractor shall provide EPA technical analysis in the area of GHG inventories, reporting and management. This could include, but is not limited to:

- Quick turnaround analytical work
- Performing some program evaluation
- Helping to implement new features or enhancements to the Center

This work will be technical in nature and could be in support of both internal EPA as well as external drivers. The contractor shall work with the COR to provide work as needed under this task.

## **DELIVERABLES**

- The Contractor shall prepare e-mails, word processing documents, spreadsheets, etc., as needed, for analytical work or program evaluation within two weeks of written initiation.

## **Task 4.0      Communications Support to the Center**

The Contractor shall provide EPA with the following support:

- Advise on strategy, alignment and valuation of EPA's GHG management tools and resources;
- Define and categorize target audiences for strengthening awareness and use of EPA's GHG management tools and resources;
- Develop effective communications and credible marketing strategies for select target audiences;
- Advise on how to best leverage relationships with existing stakeholders to increase use of EPA's tools among select target audiences. Leverage relationships with key stakeholders, such as the NGO, investor and consulting communities, to improve credibility and recognition for GHG management tools and resources;
- Leverage media relations and use of social media (such as LinkedIn, Twitter, Facebook, etc.) to increase press coverage and public awareness of EPA's GHG management tools and resources;
- Supply EPA final print versions or digital files for all materials developed under this subtask for new or updated existing materials.
- Support the COR in assessing communications effectiveness and help identify improvements. The Contractor shall support EPA in managing existing program communications as well as support the identification, planning, and development of new communications opportunities;
- Provide support for the Center website, including assistance with regular maintenance and with aligning existing content with the interests of target audiences; and
- Provide other related work as directed under this subtask.

#### **Subtask (4.1): Marketing and Communications Materials for the Center**

The Contractor shall develop creative materials for distribution to the public and other stakeholders in the U.S. and elsewhere, which may include brochures; advertisements; posters; program documents; program logos; folders; labels; slides; photographs; newsletters; articles; awards and certificates; buttons; outreach presentations; banners; displays, booths and kiosks; maps; billboards; briefings; charts; and annual reports on programs. In addition, the Contractor shall develop messaging documents, technical documents, technical outreach materials, Q&A documents, and PowerPoint presentations, graphics, audiovisual materials for briefings, meetings, workshops and public presentations, and support updates to existing documents. These materials will target various industry, business, and other key stakeholder groups.

The Contractor shall support EPA in content development, graphic design, layout, distribution and transport of materials. All outreach materials must be critically reviewed and approved by an EPA COR before distribution by the Contractor. The Contractor shall provide graphic design and layout for each developed material under this subtask. The Contractor shall draft figures; posters, charts, or computer briefing programs with animation; provide necessary translation; while meeting Federal government and 508 accessibility compliance requirements. The Contractor shall provide quality copy review and copy-editing control measures to achieve high standards of grammar and spelling, while meeting Federal requirements for plain language use.

The Contractor shall use various media in distributing outreach and educational materials, communication content and presentations, including: print documents, emails, on-line training programs or through other electronic means, such as bulletin boards; home pages and other Internet Websites, CD-ROMs, pod-casts, webinars, public service advertisements, posters, or trade-show displays. The Contractor may be required to translate the material to and from foreign languages.

The Contractor shall execute necessary Salesforce data entry and maintenance tasks as directed by the COR. The Contractor shall coordinate with stakeholders and other Contractors as necessary to execute the work under this task order.

#### **DELIVERABLES**

- The Contractor shall provide work as directed under this task.
- The Contractor shall update or maintain stakeholder information in Salesforce for Center contacts, and manage regular communications between EPA and Center stakeholders including mass emails on average of once per month.
- The Contractor shall supply EPA final print versions or digital files for all materials developed under this task for new or updating existing materials.
- The Contractor may provide updates to four print brochures delivered electronically and posted on the program's Web site. The Contractor shall provide quick response (i.e., 24-hour) for revisions of these materials.
- EPA expects to revise several technical documents each year, for which the Contractor may provide editing, design, layout, electronic files, and distribution.



- The Contractor shall provide a first article proof for certain design materials upon request by the COR. The Contractor shall provide posters, computer demonstrations, or other materials for display in booths or on tables at trade shows for the program areas covered in the Statement of Work. The Contractor shall develop concepts; design booth or table layout; develop professional posters and computer demonstrations, automatic slide shows or other materials as part of the booth or table; and prepare booths or tables suitable for installation in exhibition areas at conferences or other public gatherings.
- The Contractor shall supply EPA final print versions or digital files for all materials developed under this subtask for new or updated existing materials.
- The Contractor shall develop and preserve an integrated “look and feel” across all program materials.
- The Contractor shall provide other related work as directed under this subtask.

#### **Subtask (4.2): Database, Web Tools and Application Support for the Center**

The Contractor shall provide development, management, and technical support for existing Web tools, databases and applications as well as develop new Web tools, databases and applications where needed. The Contractor shall provide support in meeting all EPA and federal Web guidelines as it concerns databases, Web tools and applications. The Contractor shall provide data control measures to ensure a high-level of data and content quality. The Contractor shall assist EPA in managing its database to generate high quality reports to manage contacts and information and track program statistics.

The Contractor shall provide computer design and programming services, develop various improvements including hot-links to other similar materials, e-mail links to EPA, and document download capacities. The Contractor shall provide frequent updates to keep material current, and assess and carry out innovative approaches to using the Internet or similar systems as a program outreach tool. The Contractor will also provide EPA with technical assistance in using web-based tools to disseminate best practices for GHG management among stakeholders in a live, online forum (such as webinars, conference calls, etc).

The Contractor shall develop CD-ROM or other interactive computer tools to convey key general or technical information about program areas covered in the Statement of Work.

#### **DELIVERABLES**

- Develop new and update existing Web tools and applications as identified by the COR, such as reporting and calculation tools.
- EPA expects to organize up to six webinars during the period of performance.
- The Contractor shall provide work as directed under this subtask.
- The Contractor shall supply EPA final print versions or digital files for all materials developed under this subtask for new or updated existing materials.

### **Subtask (4.3): Center Web site ([www.epa.gov/climateleadership](http://www.epa.gov/climateleadership))**

The Contractor shall provide overall Web support covering Web design, maintenance, edits, improvements and technical issues, as well as usability, analytics and statistics reports for EPA Web sites. The Contractor shall work with the EPA COR on all Web-related issues and support the COR in Web site management, including identifying and solving technical issues. The Contractor shall provide development and management support for existing Web pages as well as develop new web material for the Center (i.e., new Web pages or Web site).

The Contractor shall follow all EPA and federal Web guidelines including, but not limited to, the 1998 Presidential guidance on the use of Plain Language in government publications, documents and Web-content. The Contractor shall comply with all 508 accessibility requirements. The Contractor shall also support complying with all EPA-wide Web changes and formatting requirements. The Contractor shall provide quality control measures to ensure a high-level of data and content quality, including grammar and copy-editing for all Web content including Web pages and Web distributed documents. The Contractor, under the direction of the EPA COR, shall provide development and maintenance support for all Web site updates to include events, links checks, new content, etc.

### **DELIVERABLES**

- EPA expects a schedule of two updates per month to static Web pages to include irregular occurring content updates such as events, link checks, newsroom, new content on existing pages, graphics, and charts.
- The Contractor will help EPA restructure the Center Web site to better reflect the needs of targeted audiences and help emphasize unique EPA tools like the Corporate GHG Goal Evaluation Model and the Emissions Factor Hub.
- The Contractor shall develop and update Web-based content and graphics as directed by the COR.
- The Contractor shall provide EPA monthly Web site analytics and statistics reports about Web site visitor behavior and usability, or as directed by the COR.
- Daily phone call and email Website update and planning discussions as needed.
- The Contractor shall provide work as directed under this subtask.